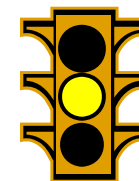




# CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



## STRATEGIC GOALS

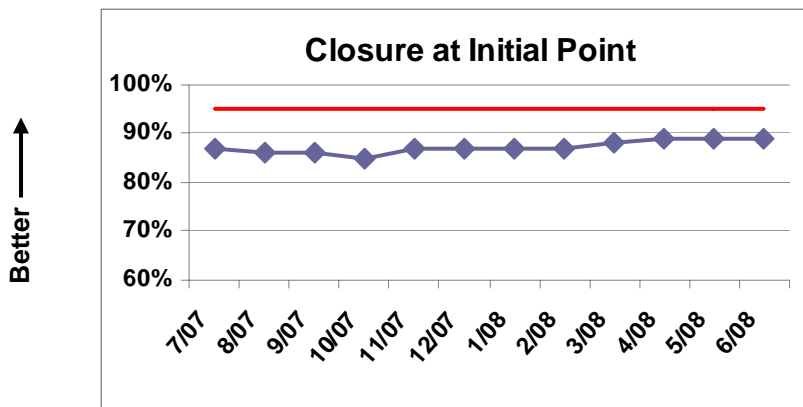
- II. Foster a work environment that values quality, respect, diversity, integrity, openness, communication and accountability.*
- III. Sustain a high performance work culture utilizing staff development, technology, and innovative leadership and management strategies.*

## MEASURE:

*Percent of telephone inquiries closed at initial point of contact.*

## Closure at Initial Point of Contact

**Target: 95%**



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	87%	86%	86%	85%	87%	87%	87%	87%	88%	89%	89%	89%
2006/07	87%	87%	86%	89%	94%	88%	88%	88%	87%	87%	87%	87%

## INITIATIVES: *Improve staff training and knowledge*

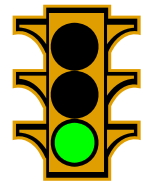
Initiatives	Milestones
<i>Increase knowledge level of phone agents to answer member questions and reduce escalated calls to program areas.</i>	<ul style="list-style-type: none"><li>By 12/31/08, provide second level health benefit training to 2/3 of our existing staff.</li></ul>

## COMMENTS:

- This dashboard is coded yellow again this past quarter because we anticipate further improvements as staff experience increases.
- CSED continues to identify training needs of staff through call monitoring and evaluation of escalated inquiries presented to the program areas.
- ETM and PSR is partnering to develop system training that will also encompass program information that will enable staff to close more calls.



# CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



## STRATEGIC GOALS

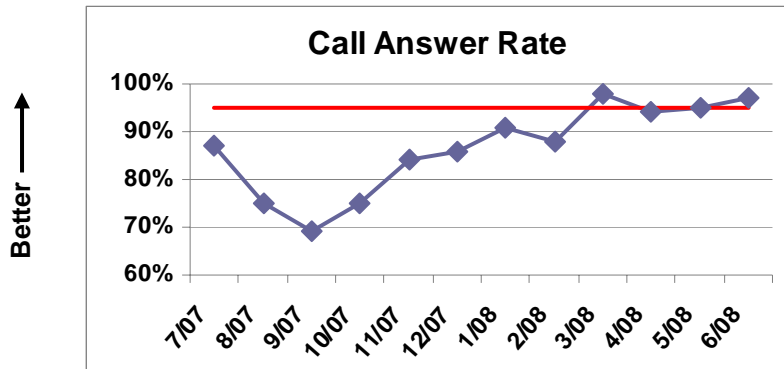
V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

## MEASURE:

Answer before the caller abandons call, due to wait time.

## Call Answer Rate

Target: Answer 95% of calls received.



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	87%	75%	69%	75%	84%	86%	91%	88%	98%	94%	95%	97%
2006/07	88%	89%	80%	84%	94%	94%	97%	92%	92%	92%	95%	90%

## INITIATIVES: *Improve Customer Service*

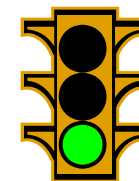
## COMMENTS:

Initiatives	Milestones
Establish resource pool of over hires to compensate for vacancies that impact service levels.	<ul style="list-style-type: none"><li>By September 30, 2008, recruit, hire and train to fill twelve additional positions.</li><li>CSED has received approval for twelve over hire positions. To date, five positions have been filled, and the recruitment process is continuing.</li></ul>

- The measure has been at, near, or above our target for the past four months.
- Over the next six month period, we will be evaluating this target and aligning it with the current environment.



# CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD

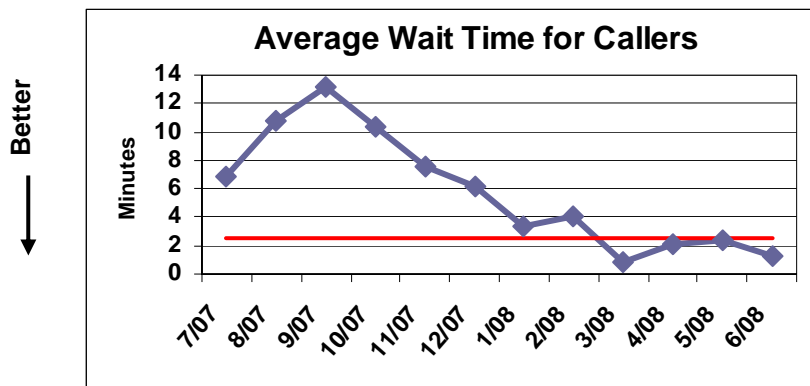


## STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.

## MEASURE:

The length of time the callers wait for an agent after leaving the Interactive Voice Response (IVR) system and entering the queue.



## Average Wait Time

**Target:** Answer calls within a monthly average of 2 minutes and 30 seconds.

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	6:55	10:49	13:10	10:19	7:37	6:08	3:25	4:03	0:47	2:10	2:25	1:15
2006/07	6:29	5:42	10:30	7:34	3:53	3:37	2:37	4:50	5:10	5:04	3:04	5:39

## INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
Establish resource pool of over hires to compensate for vacancies that impact service levels.	<ul style="list-style-type: none"><li>By September 30, 2008, recruit, hire and train to fill twelve additional positions.</li><li>CSED has received approval for twelve over hire positions. To date, five positions have been filled, and the recruitment process is continuing.</li></ul>

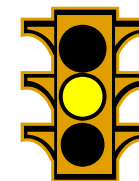
## COMMENTS:

- The measure has been at, near, or above our target for the past four months.
- Over the next six month period, we will be evaluating this target and aligning it with the current environment.

ATTACHMENT B-3



# CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



## STRATEGIC GOALS

**V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.**

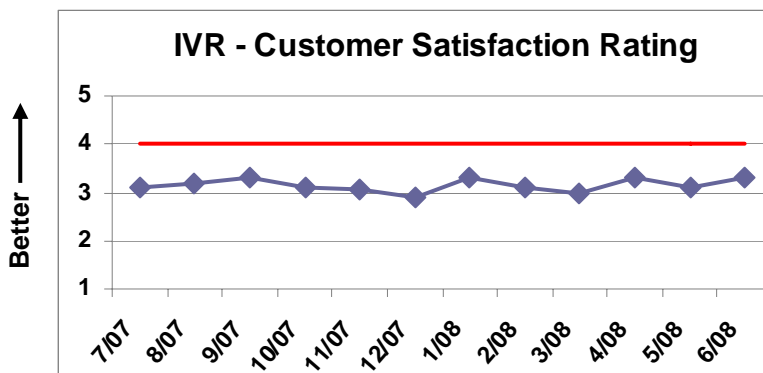
**VI. Administer pension benefit services in a customer oriented and cost effective manner.**

## MEASURE:

*Overall customer satisfaction rating for the Interactive Voice Response (IVR) system.*

## IVR Customer Satisfaction Rating

**Target: 4.0 (average).**



Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	3.1	3.2	3.3	3.0	3.0	2.9	3.3	3.1	3.0	3.3	3.1	3.3
2006/07	3.3	3.3	3.2	3.3	3.4	3.3	3.3	3.4	3.3	3.3	3.3	3.3

## INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
<i>Evaluate and improve the IVR system so it is more user friendly for members.</i>	<ul style="list-style-type: none"><li>By June 30, 2009, in conjunction with implementation of the PSR project, provide member authentication on the IVR.</li><li>By September 30, 2009, in conjunction with PSR implementation begin to provide self service opportunities on the IVR comparable to services provided on the web.</li></ul>

## COMMENTS:

- We are changing this dashboard from red to yellow.
- We have changed the format of this dashboard to better reflect the measure, which is a satisfaction rating from 1 through 5, with 5 being the highest rating possible.
- The rating scale the customer sees on the survey card is shown below:

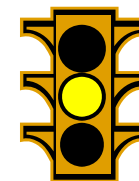
Not Satisfied      Very Satisfied

1   2   3   4   5

- A service request has been submitted to obtain cost estimates to remove dialogue modules from the IVR system and only provide modules with self service features.

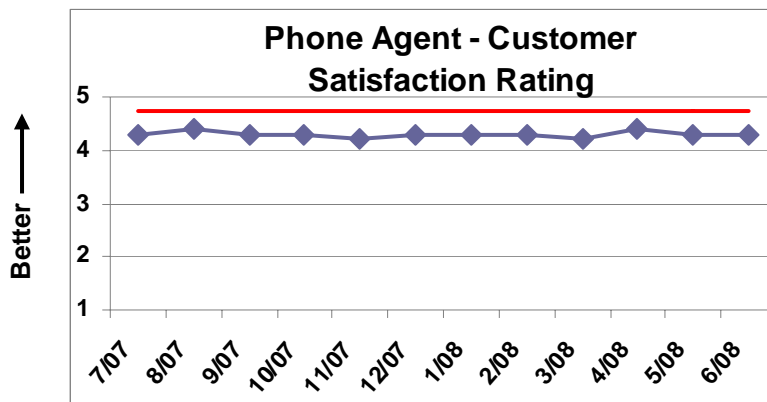


# CUSTOMER SERVICE AND EDUCATION DIVISION DASHBOARD



## STRATEGIC GOALS

V. Provide sustainable pension benefit products and services responsive to and valued by members, employees and stakeholders.



## MEASURE:

Customer satisfaction rating for phone agent services.

## Phone Agent Customer Satisfaction Rating

Target: 4.7 (average)

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2007/08	4.3	4.4	4.3	4.3	4.2	4.1	4.3	4.3	4.2	4.4	4.3	4.3
2006/07	4.3	4.3	4.4	4.4	4.4	4.4	4.4	4.4	4.4	4.4	4.3	4.4

## COMMENTS:

## INITIATIVES: *Improve Customer Service*

Initiatives	Milestones
<ul style="list-style-type: none"><li>• Manage workforce to meet customer demand during peak periods.</li><li>• Improve agent customer service skills through formal training and professional coaching.</li><li>• Improve average customer rating for the "timely and efficient processing" factor.</li></ul>	<ul style="list-style-type: none"><li>• By March 1, 2008, recruit, hire, train 2 additional QA coaches (in progress: one coach is still in training).</li><li>• In 2007-08, the enterprise developed and implemented a cross-divisional Escalated Customer Inquiry Improvement Plan to improve customer satisfaction and the timely resolution of such inquiries.<ul style="list-style-type: none"><li>• A shared monitoring tool with reporting functions was developed by ITSb.</li><li>• Monthly cross divisional meetings to evaluate results are taking place.</li></ul></li></ul>

- We are coding this dashboard yellow again.
- We have been maintaining a 4.3 or higher approval rating for the last quarter reflecting that customer service expectations are being realized.
- We have changed the format of this dashboard to better reflect the measure, which is a satisfaction rating from 1 through 5, with 5 being the highest rating possible.
- The rating scale the customer sees on the survey card is shown below:

Not Satisfied      Very Satisfied

1      2      3      4      5
- A new training manager was hired effective May 5, 2008.

4th Quarter 2007-08